



santee cooper[®]
home



Smart Energy New Homes Program

2013 Certification Guidelines

REDUCE[™]
THE USE
South Carolina

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Smart Energy New Homes

2013 Program Overview

Santee Cooper's Smart Energy New Homes Program offers rebates to homebuilders who construct homes that achieve minimum energy efficiency performance through established, reliable building technologies. Participating homebuilders may take advantage of free technical assistance and technical training. Homebuilders who build ENERGY STAR® qualified homes have the potential to benefit from increased exposure through Santee Cooper's Reduce The Use marketing campaign.



ENERGY STAR® is a joint program of the U.S. Environmental Protection Agency and the U.S. Department of Energy and is a nationally recognized symbol of energy efficiency.

Financial Rebates

Rebates are available to participating homebuilders who construct homes that meet ENERGY STAR or Smart Energy New Home performance path criteria and compliance with Santee Cooper's eligibility requirements.

2013 Rebate Structure

Rebate Level	Performance Requirements	Single Family Rebate ¹	Multi-Family Rebate ²
ENERGY STAR	• Meet national ENERGY STAR for Homes v3.0 performance pathway guidelines. ³	\$1,600	\$1,000
Smart Energy New Home	• Achieve a HERS Index of 85 or below (≥15% more efficient than 2006 IECC).	\$1,000	\$600

Eligibility Requirements

Homes must meet the following requirements to be eligible for rebates as part of Santee Cooper's Smart Energy New Homes Program.

- ☐ The home must be separately metered and receive electrical service from Santee Cooper.
- ☐ All homes must be completed and a permanent meter set prior to November 15, 2013.
- ☐ The home must be all electric excluding hybrid heat pumps and decorative gas logs.
- ☐ All homebuilders must be an official partner in the national ENERGY STAR for Homes Program.
- ☐ The home's HVAC equipment must:
 - be installed by a Santee Cooper Residential Trade Ally

¹ Single-family rebate levels shall apply to detached homes, where no other adjacent dwellings are directly or indirectly connected by a garage, another dwelling or building structure.

² Multi-family rebate levels shall apply to all attached homes that fall within ENERGY STAR's policy on qualifying units in multi-family buildings, and are also limited to homes that qualify under ENERGY STAR's definition for single-family attached homes. (See Qualifying Homes under the ENERGY STAR Qualified Homes National Program Requirements Version 3.0.)

³ ENERGY STAR Qualified Homes National Program Requirements are established by the U.S. Environmental Protection Agency (www.energystar.gov/homes).

Smart Energy New Homes

- be commissioned by the trade ally using Santee Cooper's HVAC Quality Installation Form or an ENERGY STAR HVAC System Inspection Checklist
 - be an air-source heat pump with a minimum 8.2 HSPF / 14.5 SEER / 12 EER rating OR an ENERGY STAR qualified ground-source heat pump.
- ❑ The home can be single-family, new residential construction or a total gut rehab.⁴ Single-family rebate levels shall only apply to detached homes, where no other adjacent dwellings are directly or indirectly connected by a garage, another dwelling or building structure.
- ❑ The home can be multi-family, new residential and mixed-use (residential and commercial) construction as long as it falls within ENERGY STAR's policy on qualifying units in multi-family buildings. Multi-family rebate levels shall apply to all attached homes that fall within ENERGY STAR's policy on qualifying units in multi-family buildings, and are also limited to homes that qualify under ENERGY STAR's definition for single-family attached homes. (See Qualifying Homes under the ENERGY STAR Qualified Homes National Program Requirements Version 3.0.)
- ❑ The energy performance of the home must be verified by an accredited Home Energy Rating System (HERS) Rater using RESNET-approved home modeling software.

Technical Assistance and Training

Santee Cooper's program offers access to technical assistance and training to help homebuilders meet requirements for ENERGY STAR or Smart Energy New Homes.

- ❑ Santee Cooper is offering coupons valued up to \$200 each to be applied towards plan reviews and consultation by a RESNET-certified HERS rater. Coupons shall be redeemed based upon the following:
 - Maximum of two coupons permitted per builder/developer
 - Plan review and consultation must result in a qualifying Smart Energy New Home or ENERGY STAR rebate
- ❑ Technical training workshops and in-field training about cost-effective, energy-efficient construction practices.

Marketing Support and Opportunities

The program intends to increase consumer awareness of ENERGY STAR qualified homes and provide homebuilders with the necessary assistance to effectively utilize the ENERGY STAR brand in the competitive real estate market. Support available in 2013 includes:

- ❑ Homebuilder promotion and informational content on www.ReduceTheUse.com that intends to increase awareness for ENERGY STAR qualified homes and guide potential homebuyers to participating homebuilder's Websites.
- ❑ Assistance for homebuilders to integrate ENERGY STAR into marketing messages and sales tools.
- ❑ Access to free national ENERGY STAR marketing and sales tools for homebuilders that partner with the national ENERGY STAR program.

⁴ A "total gut rehab" is a complete restoration of a building or house wherein everything inclusive, i.e. the thermal envelope, electrical wiring, HVAC equipment, plumbing, windows, doors, etc., are updated to current code compliance with the exception of the actual framed structure itself.

How to Participate

To participate in the Smart Energy New Homes Program, homebuilders must complete all of the steps below for enrollment. Steps 1 through 4 are essential for setting up the builder account. After the builder account is created, Santee Cooper will notify the builder's primary contact by e-mail to inform that enrollment has been established. When a building permit is issued to begin construction of a home, the builder should complete steps 5 through 8 to initiate a project account and thereafter obtain confirmation that the requested rebates are available.

Step 1: Confirm Eligibility

- ❑ Only homes receiving electrical service from Santee Cooper are eligible for a rebate. Other eligibility requirements are described in the Program Overview and also on Santee Cooper Participation Application & Agreement Form. Call 214-302-8185 or send an e-mail to SENH@clearesult.com with any questions regarding these eligibility requirements or forms.

Step 2: Submit Home Plans to a Certified Home Energy Rating System (HERS) Rating Company

- ❑ Select a HERS Rating Company.
 - Visit www.resnet.us for a list of certified home energy Raters serving Santee Cooper's service area.
 - E-mail or mail a full copy of your home plans to the HERS Rater. All essential specifications information must be included with each plan. All home plans must include proper specifications information included to properly analyze the home.
 - Review the plans with your HERS Rater, who will assist you in identifying the most cost-effective upgrades to qualify your home as ENERGY STAR® or meet the performance requirements of Smart Energy New Homes.
 - Determine if you will build your homes to meet either ENERGY STAR guidelines or Smart Energy New Homes guidelines.

Step 3: Electronically submit an ENERGY STAR Partnership Agreement Form to the U.S. EPA

- ❑ Homebuilders must become a partner with the national ENERGY STAR for Homes Program before their home(s) can earn the ENERGY STAR or receive any rebate under Santee Cooper's Smart Energy New Homes Program.
 - Complete and submit the EPA Partnership Agreement. The form can be found online at <http://www.energystar.gov>.
 - Once a partner, homebuilders can take advantage of FREE ENERGY STAR marketing and sales tools and begin to use the ENERGY STAR logo in advertising.

Step 4: Complete and Submit a Participation Application & Agreement and a Form W-9 to participate in Santee Cooper's Smart Energy New Homes Program

- ❑ Homebuilders must submit a valid copy of Santee Cooper's Participation Application & Agreement only once during the project calendar year, as well as a Form W-9.
- ❑ The applicant information on the Santee Cooper Participation Application & Agreement must be consistent with the information provided in the ENERGY STAR Partnership Agreement.
- ❑ E-mail, fax, or mail the Participation Application & Agreement Form and Form W-9 to:

Santee Cooper Smart Energy New Homes
6500 North Belt Line Road, Suite 250
Irving, TX 75063
email: SENH@clearesult.com

fax: 888.744.5242



Step 5: Submit Rebate Reservation Worksheets and Building Permits to Reserve Rebate Funding for Homes Prior to Construction of Individual Projects.

- ❑ Complete one Rebate Reservation Worksheet per home address or development community. A Rebate Reservation Worksheet can be submitted along with the Participation Application & Agreement or at a later date, but prior to construction of the home.
 - Additional Rebate Reservation Worksheets and Building Permits can be submitted throughout the year for other eligible projects or development communities as long as Santee Cooper has a valid Participation Application & Agreement for the builder. Rebate reservations shall be allotted to properly enrolled projects on a first come, first serve basis.
 - Rebate payments will be made to the company or individual per the Applicant Information section of the Santee Cooper Participation Application & Agreement.
 - All information on the Rebate Reservation Worksheet must be the same as provided in the Participation Application & Agreement. All forms must be properly filled-out and submitted by September 30, 2013. Incomplete forms will not be processed.
 - E-mail, fax, or mail the Rebate Reservation Worksheet (see **Step 4** for address)

Step 6: Receive Written Notification of Rebate Reservation

- ❑ Santee Cooper will notify the builder's primary contact by e-mail on the availability of rebate funding. Rebates are reserved based on your commitment to meeting the program eligibility requirements as outlined in the Program Overview and the Participation Application & Agreement.
 - Notifications shall only be forwarded to builders when all essential applications and forms have been properly submitted for individual projects.
 - No rebates will be paid for any homes completed prior to the date of notification to the builder regarding the availability of funds (See **Step 5** above), i.e. A home that is constructed prior to the date of project enrollment will not be eligible for a rebate.

Step 7: Build Home and Verify Performance

- ❑ Build the home to the program specifications per agreement with your HERS Rater to achieve desired performance above code and rebate level.
 - The HERS Rater will conduct on-site inspections and diagnostic tests to verify the performance of the home and determine whether or not it meets the ENERGY STAR or the Smart Energy New Home specifications as required per the Smart Energy New Homes Program guidelines.
 - Refer to Program Overview for additional information on rebate levels.

Step 8: Receive Rebate Payment

- ❑ Receive rebate payment after home performance is verified.
 - The HERS Rater will submit a Project Completion Form after completing the final on-site inspection.
 - The rater must submit all required documentation based on a confirmed HERS rating, which is required for review prior to finalizing rebate payments for individual projects.
NOTE: All documentation must be submitted to Santee Cooper by November 15, 2013.
 - The program staff will review all documentation and may complete an on-site inspection to confirm all information is accurate and in compliance with program eligibility requirements. The final rebate amount will be based on the performance level of the home as verified by the HERS Rater.
 - Upon confirming project compliance, rebate payments for all related accounts shall be processed and mailed to the address provided in the Participation Application & Agreement.

Smart Energy New Homes

Frequently Asked Questions

What is the Smart Energy New Homes Program?

The Smart Energy New Homes Program is sponsored by Santee Cooper as part of its commitment to reduce energy consumption. As part of the program, Santee Cooper provides technical resources and rebates to help homebuilders construct homes that meet ENERGY STAR® or Smart Energy New Home performance criteria. Homebuilders who build ENERGY STAR qualified homes have the potential to benefit from increased exposure from Santee Cooper's Reduce The Use marketing campaign.

Who can apply for rebates?

All homebuilders, who build new all-electric homes in Santee Cooper's service area, are eligible to participate. See **How to Participate** for a description of the enrollment process.

What are the requirements to receive a rebate?

To qualify for rebates under the Smart Energy New Home Program, all homes must comply with Santee Cooper's eligibility requirements, and achieve corresponding performance criteria as specified per the ENERGY STAR or Smart Energy New Home guidelines:

- ☐ The home must be separately metered and receive electrical service from Santee Cooper.
- ☐ All homes must be completed and a permanent meter set prior to November 15, 2013.
- ☐ The home must be all electric excluding hybrid heat pumps and decorative gas logs.
- ☐ All homebuilders must be an official partner in the national ENERGY STAR for Homes Program.
- ☐ The home's HVAC equipment must:
 - be installed by a Santee Cooper Residential Trade Ally
 - be commissioned by the trade ally using Santee Cooper's HVAC Quality Installation Form or an ENERGY STAR HVAC System Inspection Checklist
 - be an air-source heat pump with a minimum 8.2 HSPF / 14.5 SEER / 12 EER rating OR an ENERGY STAR qualified ground-source heat pump..
- ☐ The home can be single-family, new residential construction or a total gut rehab.¹ Single-family rebate levels shall only apply to detached homes, where no other adjacent dwellings are directly or indirectly connected by a garage, another dwelling or building structure.
- ☐ The home can be multi-family, new residential and mixed-use (residential and commercial) construction as long as it falls within ENERGY STAR's policy on qualifying units in multi-family buildings. Multi-family rebate levels shall apply to all attached homes that fall within ENERGY STAR's policy on qualifying units in multi-family buildings, and is also limited to homes that qualify under ENERGY STAR's definition for single-family attached homes. (See Qualifying Homes under ENERGY STAR Qualified Homes National Program Requirements Version 3.0).
- ☐ The energy performance of the home must be verified by a Certified Home Energy Rating System (HERS) Rater using accredited home modeling software.

¹ A "total gut rehab" is a complete restoration of a building or house wherein everything inclusive, i.e. the thermal envelope, electrical wiring, HVAC equipment, plumbing, windows, doors, etc., are updated to current code compliance with the exception of the actual framed structure itself.

Smart Energy New Homes

In addition to Santee Cooper's eligibility requirements, ENERGY STAR Homes must also achieve a HERS Index equal to or less than the HERS Index Target² for qualification (www.energystar.gov/homes). Homes that achieve a HERS Index of 85 or less that do not meet ENERGY STAR guidelines may qualify as a Smart Energy New Home.

What is a Smart Energy New Home?

Smart Energy New Homes are 15 percent or more energy efficient than a home built to the 2006 International Energy Conservation Code (IECC). To earn the Smart Energy New Home designation, a home must achieve a HERS Index of 85 or lower as verified by an independent certified HERS Rater.

How does a home achieve the Smart Energy New Home guidelines?

The process begins with an independent HERS Rater who performs a computer modeling of your house plans to determine the estimated energy use. The HERS Rater will make recommendations to help your home meet the Smart Energy New Home specifications. The HERS Rater will make at least two site visits during home construction to verify the home is being constructed to maximize energy savings and comfort, and to ensure it will meet the Smart Energy New Home guidelines. Upon completion of these steps, the house is certified as a Smart Energy New Home. The HERS Rater will provide you with a certificate and home label verifying that the home meets the Smart Energy New Home specifications.

What is ENERGY STAR?

ENERGY STAR is a voluntary program designed to identify, promote, and increase the use of energy-efficient products to reduce greenhouse gas emissions and protect the environment for future generations. Established by the U.S. Environmental Protection Agency (EPA) and Department of Energy (DOE) in 1992, the ENERGY STAR is now found on more than 60 product categories for the home and workplace, as well as on new homes. According to ENERGY STAR, these products deliver the same or better performance as comparable models while using less energy and saving users money³

What is an ENERGY STAR qualified home?

Homes that earn the ENERGY STAR rating meet rigorous performance standards established by the EPA and DOE. ENERGY STAR qualified homes consume less energy than a similar house built to 2006 International Energy Conservation Code (IECC). As a result, ENERGY STAR qualified homes typically cost less money to own and operate.

How does a home qualify for ENERGY STAR?

The certification process begins with an independent HERS Rater who performs a computer modeling of your house plans to determine the estimated energy use. The HERS Rater makes recommendations to help your home meet ENERGY STAR specifications. The HERS Rater will make at least two site visits during home construction to verify that your home is being constructed to maximize energy savings and comfort, and to ensure it will meet ENERGY STAR guidelines. The HERS Rater will also assist with you with the completion of several ENERGY STAR checklists. Upon completion of these steps, the house is

² The HERS Index Target shall be determined as outlined in the ENERGY STAR HERS Index Target Procedure.

³ U.S. Environmental Protection Agency. History of ENERGY STAR. www.energystar.gov/history

Smart Energy New Homes

certified as an ENERGY STAR qualified home. The HERS Rater will provide you with a certificate and home label verifying that the home meets ENERGY STAR specifications.

What are the benefits of building ENERGY STAR or Smart Energy New Homes?

ENERGY STAR and Smart Energy New Homes provide homebuilders with the assurance that they are building an energy-efficient product. The higher quality construction based upon standardized and verified building practices and the quality equipment installations typically result in: decreased call backs and enhanced customer satisfaction.



ENERGY STAR label

What are the benefits of selling ENERGY STAR qualified homes?

ENERGY STAR qualified homes can be a great value for homeowners. Homeowners can benefit from greater energy savings and personal comfort throughout the home. Homebuyers can trust that their home is truly energy efficient because it has been verified by a third party to meet strict performance guidelines.

How much does it cost to verify a home?

The cost of verification depends on several factors including:

- Performance Target – ENERGY STAR or Smart Energy New Homes
- The size of the home

We recommend shopping around among several HERS Raters serving Santee Cooper's service territory to find a company that meets your needs.

What are the technical specifications for an ENERGY STAR home?

The basic requirement is that you achieve a minimum level of energy efficiency. However, to qualify for Santee Cooper's rebate, the home must be all-electric, except for a hybrid heat pump and decorative gas logs. The home's HVAC system must meet minimum efficiency requirements (see below). Other typical specifications for an ENERGY STAR qualified home may include one or more of the following: enhanced insulation levels, high performance windows and/or air sealing and ventilation.

What should I consider when selecting mechanical systems for an ENERGY STAR qualified home?

The ENERGY STAR performance path as described in the ENERGY STAR Qualified Homes National Program Requirements, Version 3.0 provides flexibility to select a custom combination of measures that is equivalent in performance to the minimum requirements of the ENERGY STAR Reference Design Home. The Reference Design Home specifies:

- An air-source heat pump with a minimum 8.2 HSPF / 14.5 SEER / 12 EER rating OR an ENERGY STAR qualified ground-source heat pump. A heat pump that has a higher rating is certainly acceptable.

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- A domestic water heater that meets the following efficiency requirements:
 30 Gal = 0.94 EF; 40 Gal = 0.93 EF; 50 Gal = 0.92 EF;
 60 Gal = 0.91 EF; 70 Gal = 0.90 EF; 80 Gal = 0.89 EF

What are the consequences of "oversizing" a heating and/or air conditioning system?

If a heating and/or air conditioning system is oversized, it will satisfy calls for heat and/or air conditioning quickly—leading to a condition known as "short cycling." When systems short cycle, they turn on and off frequently spending more time in start-up/shut-down modes and less time operating at peak, "steady state" efficiencies. The mechanical stresses that result from this may be more significant than the reduction in energy efficiency. These stresses may lead to increased maintenance costs and/or premature equipment failure. Heating and cooling load calculations should always be performed and the equipment properly sized according to industry recommended practices.

Will participation in Santee Cooper's Smart Energy New Homes Program disrupt construction schedules?

Usually, there are no disruptions. Two site inspections will typically be performed during the course of construction. Santee Cooper encourages Builders to immediately communicate all scheduled HERS Rater inspections to program staff. However, Santee Cooper will reserve the right to perform additional inspections for project verification. The main purpose of these inspections is to confirm that the specifications for the house are consistent with the previously established ENERGY STAR or Smart Energy New Home specifications. Santee Cooper recommends that you budget extra time for the "rough" construction of the house—from framing to drywall. This will provide additional time to allow for careful air sealing and for a quality insulation installation.

What are the deadlines for participation in Santee Cooper's Smart Energy New Homes Program?

Santee Cooper Participation Application and Agreement	September 30, 2013
Rebate Reservation Worksheet(s) and building permit(s)	September 30, 2013
Project Completion Form and associated documentation	November 15, 2013

What support can I expect from Santee Cooper?

Santee Cooper Smart Energy New Homes Program staff will provide you with support – from submitting your initial application through home completion and rebate fulfillment. We are dedicated to ensuring that your experience in the Santee Cooper's Smart Energy New Homes Program is positive.

Who can I contact for more information?

Santee Cooper Smart Energy New Homes Program staff can be reached at SENH@clearesult.com or 214-302-8185.

Who is CLEAResult?

CLEAResult is an implementation contractor working on behalf of Santee Cooper on their Smart Energy New Homes Program.

Smart Energy New Homes

2013 Participation Application & Agreement

Santee Cooper's Smart Energy New Homes Program offers rebates to homebuilders and owner-builders who commit to constructing energy-efficient homes. Homebuilders accepted into the program may benefit from outreach activities intended to raise awareness regarding energy-efficient homes.

Please read **How to Participate** before submitting this document.

A copy of this document and a Form W-9 must be completed and submitted by the builder once annually to enroll in Santee Cooper's Smart Energy New Homes Program for the program year. All required information must be completed and submitted by September 30, 2013.

Incomplete forms will not be processed.

Applicant Information

Applicant (company or individual): ¹				
License Number:				
Mailing Address:				
City:		State:		Zip:
Web address (if applicable):				
Average Build Time (in months):		HERS Rating Company: ²		
		Residential HVAC Trade Ally:		

Contact Information

Primary Contact:	(First Name)	(Last Name)
Work Phone:	E-mail: ³	
Mobile Phone:	Fax Number:	
Marketing Contact (if applicable):	(First Name)	(Last Name)
Work Phone:	E-mail: ³	

¹ Rebates will be paid to the Applicant company or the individual if an owner-builder. This information must be the same as submitted on the building permit, the EPA Partnership Agreement and the Rebate Reservation Worksheet.

² Refer to the RESNET website to choose an independent HERS Rater.

³ E-mail will only be used for program communication and will never be distributed or sold to a third party.

2013 Eligibility Requirements

Rebates are available for homes that achieve minimum energy efficiency specifications as outlined in the **Program Overview** and meet all of the following eligibility requirements.

✓	The home must be separately metered and receive electrical service from Santee Cooper.
✓	All homes must be completed and a permanent meter set prior to November 15, 2013.
✓	The home must be all electric excluding hybrid heat pumps and decorative gas logs.
✓	All homebuilders must be an official partner in the national ENERGY STAR for Homes Program.
✓	The home's HVAC equipment must: <ul style="list-style-type: none"> be installed by a Santee Cooper Residential Trade Ally be commissioned by the trade ally using Santee Cooper's Quality Installation Form or an ENERGY STAR HVAC System Installation Checklist be an air-source heat pump with a minimum 8.2 HSPF / 14.5 SEER / 12 EER rating OR an ENERGY STAR qualified ground-source heat pump.
✓	The home can be single-family, new residential construction or a total gut rehab, as defined in the 2013 Program Overview. Single-family rebate levels shall only apply to detached homes, where no other adjacent dwellings are directly or indirectly connected by a garage, another dwelling or building structure.

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✓	The home can be multi-family, new residential and mixed-use (residential and commercial) construction as long as it falls within ENERGY STAR's policy on qualifying units in multi-family buildings. Multi-family rebate levels shall apply to all attached homes that fall within ENERGY STAR's policy on qualifying units in multi-family buildings, and is also limited to homes that qualify under ENERGY STAR's definition for single-family attached homes. (See Qualifying Homes under the ENERGY STAR Qualified Homes National Program Requirements Version 3.0).
✓	The energy performance of the home must be verified by a certified Home Energy Rating System (HERS) Rater using accredited home modeling software.
A Rebate Reservation Worksheet must be completed for each project/community in order to complete the rebate application process. Rebate Reservation Worksheets are valid for the specific year(s) indicated on the worksheet. Rebates for each project will be paid to the Applicant Company or Individual as indicated in the Applicant Information section of this Application.	

Agreement

I, the undersigned ("Applicant"), agree to the guidelines below.

- ☐ I understand that the submission of the Application and the receipt of the Notification of Rebate Reservation does not guarantee receipt of rebates. I will receive written approval from the program within two weeks that clearly states the number of rebates that will be reserved for me and to receive those rebates, the home(s) must meet the program requirements upon final inspection. No rebates will be paid for any homes completed prior to receipt of Notification of Rebate Reservation with individual confirmation of enrollment from the program.
- ☐ I understand that the rebates awarded are to assist in the defrayment of certification cost to the homebuilder, and that I will be responsible for the construction costs of achieving the guidelines of ENERGY STAR or Smart Energy New Homes.
- ☐ I understand that I am responsible for paying the HERS rating company for any fees associated with participating in the program.
- ☐ I understand that all homes must be completed and documentation submitted by November 15, 2013 and must meet the performance specifications and home eligibility requirements outlined in the Program Overview in order to receive rebate(s) requested. These standards shall be verified during site inspections by a certified HERS rating company. Santee Cooper also reserves the right to conduct final inspections as part of Quality Control processing.
- ☐ I understand that my HERS rater must submit any requested documentation related to the home energy ratings for ENERGY STAR Qualified Homes and/or Smart Energy New Homes upon completion of the rater's verification.
- ☐ I understand that rebate payments are directly tied to a home's actual energy performance and any changes to the design or specifications of the home(s) that reduce a home's performance may result in a reduction or loss of rebate(s).
- ☐ I understand that the home(s) will earn the ENERGY STAR certification only after I submit a Partnership Agreement to the EPA, and the home(s) has been approved as earning the ENERGY STAR following onsite verification inspections performed by a certified HERS rating company.
- ☐ I understand that the inspections conducted by a HERS rating company or Santee Cooper Energy Advisor are solely for the purpose of determining if the home(s) will earn the ENERGY STAR or meet the performance requirements of Smart Energy New Home, and are not safety or building code inspections.
- ☐ I understand that the rebates associated with this Agreement will only be paid to the Applicant for homes that have a valid Santee Cooper meter base number.
- ☐ I understand that I agree to indemnify and hold harmless Santee Cooper and its agents, and employees against all loss, damage, expense, and liability, resulting from injury to, or death of persons; against all injury to property arising out of or in any way connected with the performance of this Agreement.
- ☐ I understand and agree to provide Santee Cooper with all and any proof of insurance required by Santee Cooper as a condition to participate in the Smart Energy New Homes Program.
- ☐ I understand that participation in the Smart Energy New Homes Program is voluntary. Santee Cooper has the right to change, modify, or terminate this program or my participation at any time.

Applicant Signature:		Date:	
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Mail, fax, or e-mail completed the Participation Application & Agreement and the Form W-9 to:

Santee Cooper Smart Energy New Homes
 6500 North Belt Line Road, Suite 250
 Irving, TX 75063
 e-mail: SENH@clearesult.com

fax: 888-744-5242



Smart Energy New Homes

2013 Rebate Reservation Worksheet

Instructions

- Complete one Rebate Reservation Worksheet per project/community. Projects and communities are further categorized according to Santee Cooper's definition for single-family and multi-family homes as outlined under the eligibility requirements in the Program Overview.
- Rebate Reservation Worksheets and corresponding Building Permits must be completed and submitted by September 30, 2013. The homebuilder must have an active EPA Partnership Agreement, a Participation Application & Agreement and Form W-9 on file.
- Rebates will be paid to the company or individual listed in the Applicant Information section of the Participation Application & Agreement where the applicant is the same on the EPA Partnership Agreement.
- All forms must be complete to receive a rebate reservation confirmation. Incomplete forms will not be processed.

Note: Applicants must submit one each EPA Partnership Agreement, Participation Application & Agreement, and Form W-9 prior to enrolling projects, i.e. prior to submitting the Rebate Reservation Worksheet and Building Permit.

Applicant Information

Applicant (company or individual):¹

License Number:

¹ Must match Participation Application & Agreement. Rebates will be paid to the Applicant company or the individual if an owner-builder.

Project Information

Project Name:				Street Address:			
City:				State:		Zip:	
Building Permit Number(s): (Up to 10 per sheet)							
Primary Contact Name:							
	(First Name)			(Last Name)			
Primary Contact Phone:				Primary Contact E-mail: ²			
Estimated Start Date:				Estimated Completion Date:			

² E-mail to be used for program communication only and will never be distributed or sold to a third party.

Rebates Requested for Energy-Efficient Homes

Rebates Requested for Energy Efficient Homes						
Level	Specifications	Unit Type	Number of Units		Rebate per Unit	Total Rebates Requested
Smart Energy New Home	Achieve a HERS Index of 85 or below (≥15% more efficient than 2006 IECC).	Single Family		x	\$1,000	= \$
		Multi-Family		x	\$600	= \$
ENERGY STAR®	Meet national ENERGY STAR for Homes v3.0 performance pathway guidelines.	Single Family		x	\$1,600	= \$
		Multi-Family		x	\$1,000	= \$
TOTAL REBATE REQUESTED FOR HOMES						\$

Please consult with your HERS Rater and/or tax accountant for possible tax credits. Rebates are not cumulative and are subject to Santee Cooper's quality assurance and quality control processes for verifying eligibility per the Smart Energy New Homes Program guidelines.

Mail, fax, or e-mail completed the Participation Application & Agreement and the Form W-9 to:

Santee Cooper Smart Energy New Homes
6500 North Belt Line Road, Suite 250
Irving, TX 75063
e-mail: SENH@clearesult.com

fax: 888-744-5242



Smart Energy New Homes

2013 Project Completion

Home Builder:	
Project Location:	
HVAC Trade Ally:	
Primary Contact:	

Date Enrolled:	
Building Permit #:	
Meter Base #:	
Rebate Level:	

Home Builder – Applications and Forms	Status	Date
1. Program Participation		
1.1 2013 ENERGY STAR Online Partnership Agreement		
1.2 2013 Participation Application and Agreement		
1.3 Form W-9 Request for Taxpayer ID Number and Certification		
2. Project Enrollment		
2.1 2013 Rebate Reservation Worksheet		
2.2 Building Permit		

NOTE: All materials required for builder participation and project enrollment in the Smart Energy New Homes Program must be submitted no later than September 30, 2013. Post-inspections of individual projects need to be promptly scheduled with the assigned Santee Cooper representative upon completion of construction.

Third-Party Verification - Confirmation of Rebate Eligibility

The following information must be completed by a RESNET-certified HERS rater. The rater shall promptly submit this form to the assigned Santee Cooper representative upon determining the results of the final analysis. All other required third-party documentation must be submitted no later than November 15, 2013.

3. Project Overview							
3.1 Is the home all electric excluding hybrid heat pumps and decorative gas logs.							
3.2 Enter HERS Rater/HERS Rating Company per the official RESNET website listing							
3.3 Is this project new construction or total gut rehab?							
3.4 Is this project single-family(SF), multi-family(MF), or mixed use(Mixed)?							
3.5 Is the home separately metered on permanent electric service with Santee Cooper?							
3.6 Choose the applicable program, ENERGY STAR, Smart Energy New Home, etc...							
3.7 Choose the foundation type for this project.							
3.8 Enter the Confirmed HERS Index (Per the post-construction performance analysis).							
4. HVAC Equipment Information							
4.1 HVAC System #1:	EER:		SEER:		HSPF:		COP:
4.2 HVAC System #2:	EER:		SEER:		HSPF:		COP:
4.3 HVAC System #3:	EER:		SEER:		HSPF:		COP:
5. Benchmark & Safety Information							
5.1 Conditioned Floor Area:				Total Number of Bedrooms:			
5.2 Is CO Detector Present:				Check all that applies:			
6. Water Heater Information							
6.1 System 1 AHRI #:				Energy Factor:			
6.2 System 2 AHRI #:				Energy Factor:			
7. Rebate Eligibility Confirmation							
7.1 Does the project meet all eligibility requirements per program specifications?							
7.2 Enter the project's current status:							

Smart Energy New Homes

Third-Party Verification - Required Documentation	
8. ENERGY STAR	10. Smart Energy New Home
8.1 ENERGY STAR Certificate	10.1 Smart Energy New Home Certificate
8.2 Confirmed Rating/Home Verification Summary	10.2 Confirmed Rating/Home Verification Summary
8.3 Building File Report	10.3 Building File Report
8.4 Envelope Leakage Test	10.4 Envelope Leakage Test
8.5 Air Distribution System Leakage Test	10.5 Air Distribution System Leakage Test
8.6 ACCA Manual J8 Load Calculation	10.6 ACCA Manual J8 Load Calculation
8.7 Certificate of Product Rating (Heat Pump Equip.)	10.7 Certificate of Product Rating (Heat Pump Equip.)
8.8 Certificate of Product Performance (Electric Water Heater)	10.8 Certificate of Performance (Electric Water Heater)
9. ENERGY STAR Checklists	10.9 Santee Cooper HVAC Quality Install Form OR ENERGY STAR HVAC System Quality Installation Contractor Checklist
9.1 Thermal Enclosure System Rater Checklist	
9.2 HVAC System Quality Installation Contractor Checklist	
9.3 HVAC System Quality Installation Rater Checklist	
9.4 Water Management System Builder Checklist	

All project information must be completed and submitted to Santee Cooper no later than November 15, 2013.

I certify that this project meets all of Santee Cooper's program eligibility requirements. The home has been properly evaluated and tested to ensure achievement of program performance path criterion as specified under the Smart Energy New Homes Program Certification Guidelines. All measures have been properly documented and verified accordingly.

Rater's Name *(Printed)*: _____

Rater's Accreditation ID#:

Rater's Signature: _____

Project Completion Date:

Please submit all materials as follows:

To schedule a post-construction inspection, please contact:

Santee Cooper Smart Energy New Homes
6500 North Belt Line Road, Suite 250
Irving, TX 75063

e-mail: SENH@clearesult.com
Fax: 888-744-5242

Energy Advisor: _____

Email Address: _____

Smart Energy New Homes

Smart Energy New Homes Program Certification Guidelines

The Smart Energy New Homes Program offers rebates for homes that comply with Santee Cooper's eligibility requirements. Homes must also achieve specific performance criteria to be eligible to receive rebates under the Smart Energy New Homes Program per the corresponding ENERGY STAR or Smart Energy New Home designation. The energy performance rating of each home must be verified by an accredited independent Home Energy Rating System (HERS) Rater using the Residential Energy Services Network (RESNET) standards. The HERS Rater must ensure the home meets the performance path for qualification as described in the ENERGY STAR® Qualified Homes National Program Requirements, Version 3.0.¹

This document provides an overview of the Smart Energy New Homes Program certification guidelines. All homebuilders must become ENERGY STAR partners and must comply with Santee Cooper's eligibility requirements to receive applicable rebates. Program minimum eligibility requirements are described in the Program Overview and FAQ documents (See **How to Participate** for additional details).

ENERGY STAR Guidelines

Homes that earn the ENERGY STAR must meet guidelines for energy efficiency set by the U.S. Environmental Protection Agency. To earn the ENERGY STAR a home must:

- Achieve the HERS Index Target or below by using the ENERGY STAR Performance Path criterion.
- The following checklists must be completed for each ENERGY STAR home:
 - Thermal Enclosure System Rater Checklist
 - HVAC System Quality Installation Contractor Checklist
 - HVAC System Quality Installation Rater Checklist
 - Water Management System Builder Checklist
- Homes shall pass all checklist requirements as specified.

Smart Energy New Home Guidelines

Smart Energy Homes are at least 15 percent or more energy efficient than a home built to the 2006 IECC. To earn the Smart Energy Home designation a home must

- Achieve a HERS Index of 85 or below by using the Performance HERS Rating **only**.

Certification Guidelines

Below is a summary of the basic steps involved in the certification process to verify homes meet the ENERGY STAR or Smart Energy Home guidelines.

1. Choose the Performance and Rebate Level

The 2013 rebates and performance requirements are outlined in the table below. Home builders can work with their HERS Rater to determine which approach is best for them.

Rebate Level	Performance Requirements	Single Family Rebate ²	Multi-Family Rebate ³
ENERGY STAR	• Meet national ENERGY STAR for Homes v3.0 performance pathway guidelines.	\$1,600	\$1,000
Smart Energy New Home	• Achieve a HERS Index of 85 or below (≥15% more efficient than 2006 IECC).	\$1,000	\$600

¹ ENERGY STAR Qualified Homes National Program Requirements are established by the U.S. Environmental Protection Agency (www.energystar.gov/homes).

² Single-family rebate levels shall only apply to detached homes, where no other adjacent dwellings are directly or indirectly connected by a garage, another dwelling or building structure.

³ The home can be multi-family, new residential and mixed-use (residential and commercial) construction as long as it falls within ENERGY STAR's policy on qualifying units in multi-family buildings. Multi-family rebate levels shall apply to all attached homes that fall within ENERGY STAR's policy on qualifying units in multi-family buildings, and is also limited to homes that qualify under ENERGY STAR's definition for single-family attached homes. (See Qualifying Homes under the ENERGY STAR Qualified Homes National Program Requirements Version 3.0).

Smart Energy New Homes

What is the HERS Index?

The HERS Index is a scoring system established by RESNET in which a home built to the specifications on the HERS Reference Home (based on the 2006 International Energy Conservation Code) scores a HERS Index of 100, while a net zero energy home scores a HERS Index of 0.

The lower a home's HERS Index, the more energy-efficient it is in comparison to the HERS Reference Home. Each one-point decrease in the HERS Index should correspond to a 1% reduction in the energy consumption compared to the HERS Reference Home. For example, a home with a HERS Index of 85 is 15% more energy-efficient than the HERS Reference Home and a home with a HERS Index of 80 is 20% more energy-efficient.

To determine a home's HERS Index, a home energy rating involves an analysis of a home's construction plans and onsite inspections. Based on the home's plans, the HERS Rater uses an energy efficiency modeling software to perform an energy analysis of the home's design. This analysis yields a projected, pre-construction HERS Index. Upon completion of the plan review, the HERS Rater will work with the builder to identify the energy efficiency improvements needed to ensure the house will meet ENERGY STAR performance guidelines. The HERS Rater then conducts onsite inspections, typically including a blower door test (to test the leakiness of the house), a duct blaster test (to test the leakiness of the ducts), and an inspection to confirm that insulation has been properly installed and to ensure that common thermal bypasses are not present. Results of these tests, along with inputs derived from the plan review, are used to generate the HERS Index for the home.

The table below summarizes the components of the HERS Index rating system.

Component	HERS Index
Reference Home Score	The Reference Home is assigned a HERS Index of 100, while a net zero energy home is assigned a HERS Index of 0
Reference Home Basis	2006 International Energy Conservation Code (IECC)
Scale	Each 1% increase in energy efficiency corresponds to a 1-point decrease in HERS Index
Energy Use Considered	Heating, cooling, water heating, lighting, appliances.

2. Schedule Home Inspections

On-site home inspections are conducted by a HERS Rater to verify that the home is built to the ENERGY STAR or Smart Energy New Home guidelines. Homebuilders are responsible for contacting their HERS Rater to schedule testing for the home(s). Below are descriptions of the inspections.

- **Pre-insulation (optional):** a pre-insulation inspection is highly recommended, but not required, for homebuilders new to ENERGY STAR or Smart Energy New Homes. This optional inspection takes place before insulation is installed to address potential problem areas such as duct sealing of the HVAC system and air sealing of the building envelope.
- **Pre-drywall:** a pre-drywall inspection is required if the home is being built to ENERGY STAR and recommended for Smart Energy New Homes. The inspection is conducted after insulation is installed and before drywall is installed to verify items on the Rater checklists that will not be visible after the home is completed.
- **Final inspection:** a final inspection after the home has been completed is required for both ENERGY STAR and Smart Energy New Homes. At this time, the Rater will conduct a blower door test (to test the leakiness of the house) and a duct blaster test (to test the leakiness of the ducts). For ENERGY STAR, the Rater will complete the Rater checklists at this time. Santee Cooper will also conduct a brief on-site inspection either prior to or during the Rater's final.

3. Obtain ENERGY STAR or Smart Energy New Home Certification and Label

Once a home meets the ENERGY STAR or Smart Energy New Home specifications, it then becomes certified as ENERGY STAR or a Smart Energy New Home. At this time, the HERS Rater is responsible for providing the homebuilder with an ENERGY STAR or Smart Energy New Home certificate and affixing a label on the home's utility box. Homebuilders are encouraged to provide the new homeowner with the ENERGY STAR or Smart Energy New Home certificate so they can use it in the future when selling their home.

For more information regarding the ENERGY STAR guidelines and technical standards, visit www.energystar.gov/homes

